

# EMPLOYER BULLETIN

## Annual Report Reminder and MIBD Form Instructions

July 2005

### Overview

This bulletin contains information about

- filing the Employer's Annual Report of Earnings, and
- distributing the enclosed Member Information and Beneficiary Designation (MIBD) form, and

If you have any questions about the MIBD form, please call our Counseling Services Department at (800) 877-7896. For questions about the Employer's Annual Report of Earnings or the Days Worked Report form, call our Employer Services Department at (888) 877-0890, option 1.

### Employer's Annual Report of Earnings

#### Filing deadline

August 15, 2005, is the filing deadline for the 2004-2005 annual report for the 2004-2005 school year. A \$250-per-day, late-filing penalty will be assessed for each day past the August 15 deadline that the report is not on file with us.

We use the postmark date as the date of receipt. Any postmark made by any entity other than the U.S. Post Office, such as a private mailing machine, must show a date on or before August 15, 2005, **and** must be received in our Springfield office no later than four working days after August 15. To ensure that your report reaches us on time, check to make sure your envelope is properly addressed and contains sufficient postage.

### Automated Reporting System

You must file the annual report via the Automated Reporting System (ARS) if you have 50 or more contributing members.

Version 8.0 of the ARS will be used for filing the 2004-05 Employer's Annual Report of Earnings. This is the same version of the software you used to file the 2003-04 Employer's Annual Report of Earnings. No installation of new software is necessary.

Please refer to the ARS installation booklet that accompanied the annual report packet you were sent in early June. The booklet also contains instructions for installing Version 8.0 on your computer if you currently do not have the software on your computer. However, most users should already have Version 8.0 installed.

Follow the instructions in the ARS booklet to update the annual report information in the ARS. Specifically, you will need to update the Employer Demographics screen to reflect the fiscal year July 1, 2004, through June 30, 2005 as instructed in the booklet. However, you may notice in certain areas of the software and printed reports that the 2003-04 school year is listed. Please disregard these areas where the 2003-04 school year is listed. You are filing the 2004-05 Employer's Annual Report of Earnings.

### Incomplete reports

We are unable to accept reports without all the required information. Reports submitted to us with incomplete information will be returned, will be subject to the late-filing penalty described above, and will be deemed "not received" until properly completed and returned to us.

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## Member Information and Beneficiary Designation (MIBD) form

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The Member Information and Beneficiary Designation (MIBD) form provides us with valuable demographic information, and is used to initiate a new member's account, and to establish or change a member's beneficiary designation in the event of his or her death.

When a new teacher is hired who has never participated in TRS, please be sure the teacher completes a MIBD form. If you hire a teacher who already has service on record with TRS, it is not necessary to have them fill out another MIBD form. Once membership has been established with TRS, a new MIBD form is only necessary if the teacher wants to change the beneficiary designation.

**Please note that teachers do not indicate the names of the school districts in which they are employed on the MIBD form.** Consequently, please ask your new substitute teachers if they have prior TRS service or recently completed a MIBD form provided by another school district before you ask them to complete a MIBD form.

It is preferable for a teacher to complete a Change of Address form, which can be printed from our Web site, instead of a MIBD form for a change in address. If the teacher chooses to use the MIBD

form for an address change, the form must be completed fully, even if the beneficiary designation is the same.

The MIBD form can be used to notify TRS of a change in a teacher's name. The MIBD form should be completed fully, even if it is just a name change. TRS can also take an active teacher's name change in writing from the teacher.

It is important that the teacher or district mail the MIBD form as soon as the teacher completes it to ensure that the mailing address and beneficiary designation for the member is current on our system. **Please do not hold the form until the fall.**

If the teacher has filled out the MIBD form and wants you to mail it, please check that it has been completed, signed, and dated. Then mail the original form to us at:

Teachers' Retirement System  
2815 West Washington  
P.O. Box 19253  
Springfield, Illinois 62794-9253

Please do not duplicate MIBD forms. If you need additional forms, please contact the Employer Services Department at (888) 877-0890.